California Department of Mental Health

Data Collection and Reporting (DCR) System

Approver Designee Training

Example: INTERIM DCR APPLICATION

Example: ENHANCED DCR APPLICATION

(available late Summer 2006)

County Certification Process

Complete FSP Outcomes training

Submit FSP ID Codes to DMH

Complete Approver Designee Training

Your county will be certified once you have completed the above.

5 Steps to Set-up ITWS Security Access to the DMH DCR System

Step # 1: County Director designates the Approver Designee(s) with the County Approver Certification form

Step # 2: Approver Designee(s) Enroll into the DMH ITWS

Step # 3: Creating a Master Group

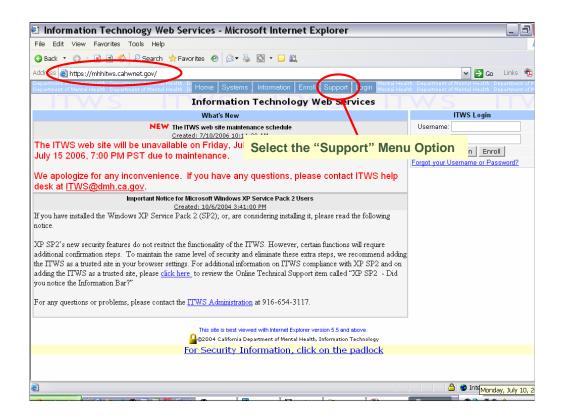**Step # 4**: Enrolling Other County Users into the ITWS System

Step # 5: Approving Pending Requests for MHSA System Membership

Once certified, the Approver Designees need to follow the steps outlined above.
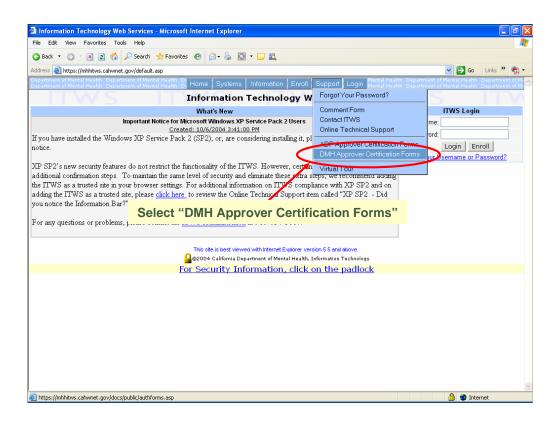
STEP # 1

Designate the
Approver Designee(s)

Go to the ITWS website:
https://mhhitws.cahwnet.gov/
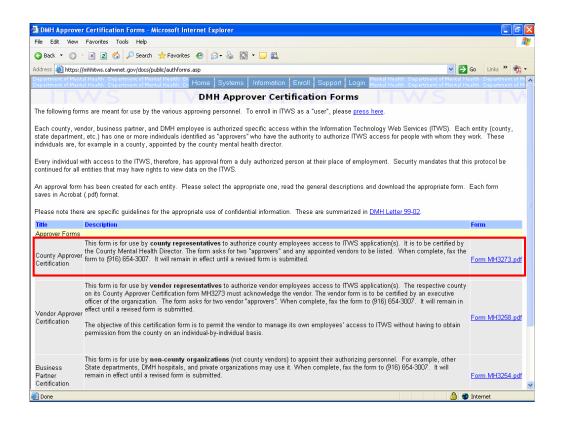
Select the "Support" Menu Option

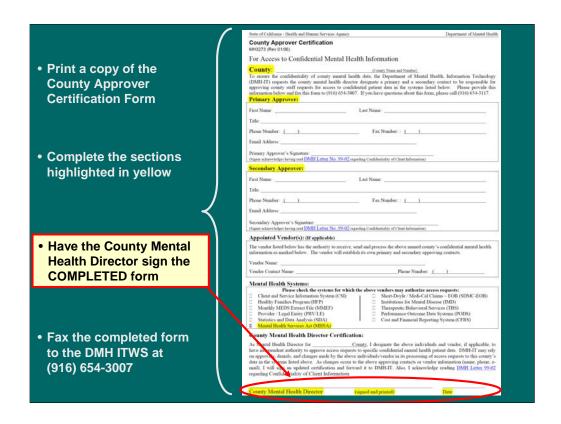**TO BECOME APPROVED AS AN APPROVER DESIGNEE:**

Go to the ITWS website https://mhhitws.cahwnet.gov/

Under the "Support" tab, click on "DMH Approver Certification Forms."

Select the County Approver Certification (Form MH3273.pdf)

Fill out the required information:

County

Primary and Secondary Approver

Under Mental Health Systems, check Mental Health Services Act (MHSA)

Have your County Mental Health Director sign and date the form

Fax completed form to the DMH ITWS at (916) 654-3007.

You will receive an email from ITWS once your account has been approved.

*Note: Your MHSA ITWS account cannot be approved until your county has been certified.

What does DMH do with the Approver Designee form once it is received?

1. DMH enters the Approver Designee's information into the ITWS System.

2. DMH contacts the Approver Designee via email to let the Approver(s) know that they are approved.

DMH ITWS staff establishes the user account for the Approver Designees (email confirmation sent to enrollee)

Subject: ITWS: Approver Status

You are receiving this message for one of three reasons:
1) You have been added as an approver with authority to approve certain users for access to the ITWS system, or

2) Your status as an approver on the ITWS system has changed through the addition or deletion of systems you are authorized for, or

3) Your approver status has been audited for accuracy.

If you have not already done so, please review the appropriate confidentiality statements and ensure you fully understand your responsibilities before exercising this authority.

You have approver authority for the following organizations and data systems:

34 - Sacramento County - MHSA

If you leave this position or no longer need this authority, if any of the enrolled users you have approved leaves or no longer needs access to this data system or ITWS, please notify us at itws@dmh.ca.gov.

ENROLLING AS AN APPROVER DESIGNEE:

Once your request has been processed, you will receive the above email.

When you have received this email, you are now ready to ENROLL as a user into the ITWS.

STEP # 2
Approver Designee(s)
Enroll into the
DMH ITWS

Go to the ITWS website:
https://mhhitws.cahwnet.gov/

AS AN APPROVER DESIGNEE, YOU MUST ENROLL YOURSELF AS A USER TO ACCESS THE ITWS.

Do NOT enroll until you receive an email confirmation (see previous slide) that your request to be an Approver Designee has been processed.
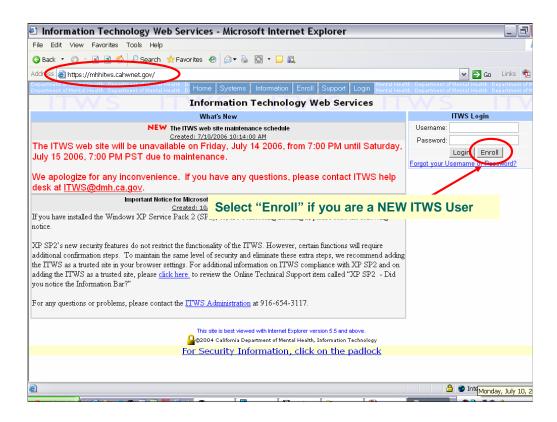
Two ways to enroll into ITWS:

1. Enroll as a <u>NEW</u> user

2. Enroll as an <u>EXISTING</u> user
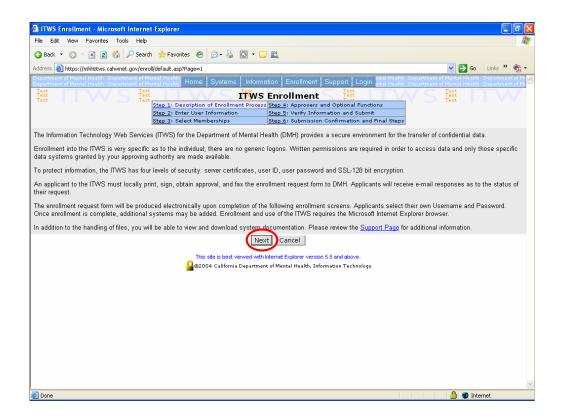
Enrolling as a
NEW ITWS User

Go to the ITWS website:

https://mhhitws.cahwnet.gov/

ENROLLING AS AN APPROVER DESIGNEE: <u>NEW</u> ITWS USER
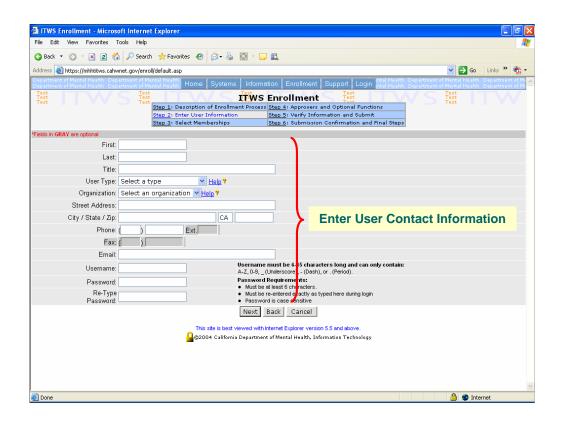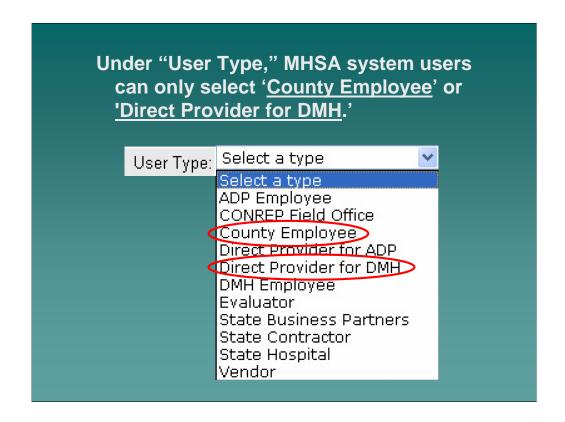
On the ITWS website (https://mhhitws.cahwnet.gov) click on the enroll button.

ENROLLING AS AN APPROVER DESIGNEE: <u>NEW</u> ITWS USER

Carefully read all the information on this screen and click on "Next" to continue.

ENROLLING AS AN APPROVER DESIGNEE: <u>NEW</u> ITWS USER

Enter your information on this screen, all fields are required (except shaded areas).

Under "User Type," MHSA system users can only select 'County Employee' or 'Direct Provider for DMH.'

ENROLLING AS AN APPROVER DESIGNEE: NEW ITWS USER

Under User Type, MHSA system users can only select one of the following:

1. County Employee *or*
2. Direct Provider for DMH

ENROLLING AS AN APPROVER DESIGNEE: <u>NEW</u> ITWS USER

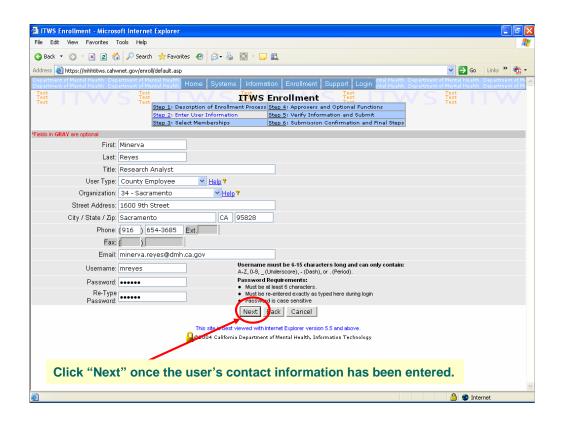Under Organization, select your county.
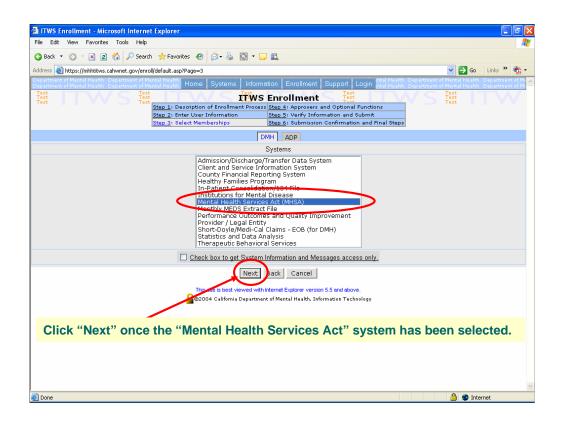
Selecting an ITWS
Username & Password

USERNAME

◆ Select a username that is easy for you to remember.

◆ Username must be 6-15 characters long and can only contain A-Z, 0-9, _ (underscore),- (dash), or . (period).

PASSWORD

◆ Must be at least 6 characters in length.

◆ Password is case sensitive.

◆ Select a password that is easy to remember. At this time, only the DMH ITWS helpdesk [(916) 654-3117] will be able to reset your password for you.

Click "Next" once the user's contact information has been entered.

ENROLLING AS AN APPROVER DESIGNEE: <u>NEW</u> ITWS USER
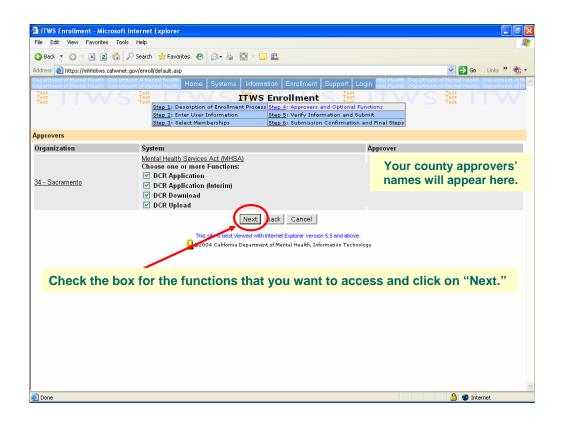
Enter your information on this screen, all fields (except the shaded fields) are required.

ENROLLING AS AN APPROVER DESIGNEE: <u>NEW</u> ITWS USER

Under DMH Systems, select Mental Health Services Act (MHSA).

NOTE: DO NOT CHECK the box that says "Check box to get System Information and Messages access only"

Click NEXT.

ENROLLING AS AN APPROVER DESIGNEE: <u>NEW</u> ITWS USER

Under System check the functions which you need access.

Click NEXT.

Mental Health Services Act (MHSA)
Choose one or more Functions:
- ☑ DCR Application
- ☑ DCR Application (Interim)
- ☑ DCR Download
- ☑ DCR Upload

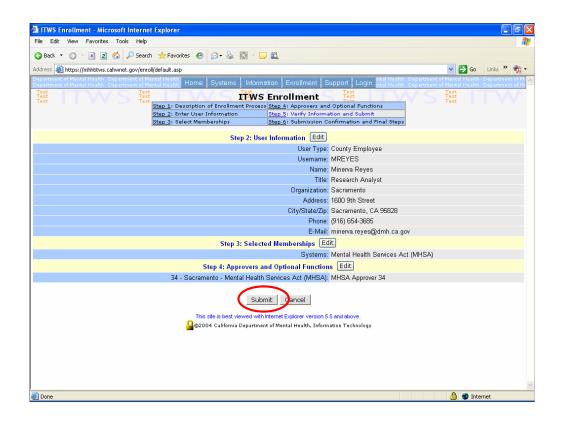**DCR Application & DCR Application (Interim)**
  – allows access to the DMH DCR

DCR Download
  – download data from the ITWS that were
    entered into the DMH DCR (XML format only)
  – download specialized reports created by DMH
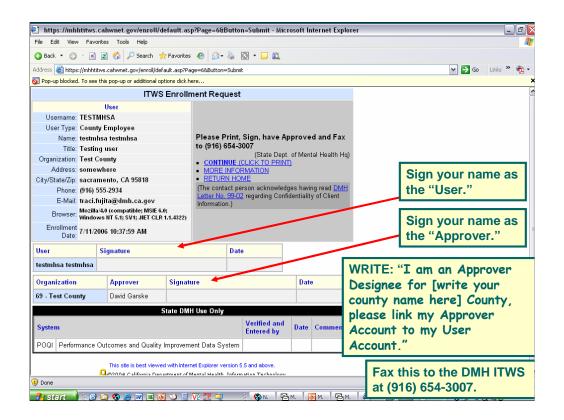
DCR Upload
  – upload data collected locally to the DMH DCR
    via the DMH ITWS (XML format only)

ENROLLING AS AN APPROVER DESIGNEE: <u>NEW</u> ITWS USER

Review the information you have entered carefully and make any necessary edits.

If everything is correct, click on the Submit button.

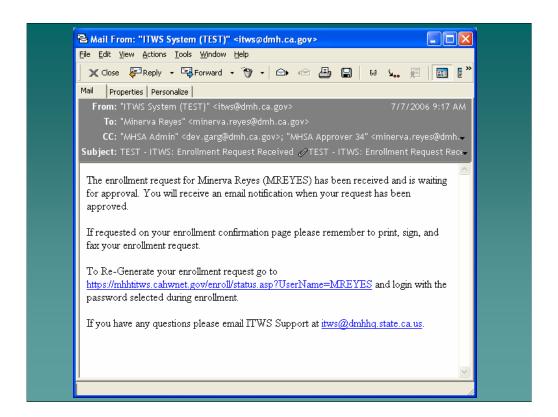## ENROLLING AS AN APPROVER DESIGNEE: NEW ITWS USER

Once you have submitted your enrollment request, you will see this enrollment request screen.

1. **PRINT this page.**
2. **SIGN and date the request next to your name as a USER.**
3. **SIGN and date the request next to your name as the APPROVER.**
4. **WRITE "I am an Approver Designee for [write your county name here] County, please link my Approver Account to my User Account." on the form.**
5. **FAX the form to the DMH ITWS at (916) 654-3007.**

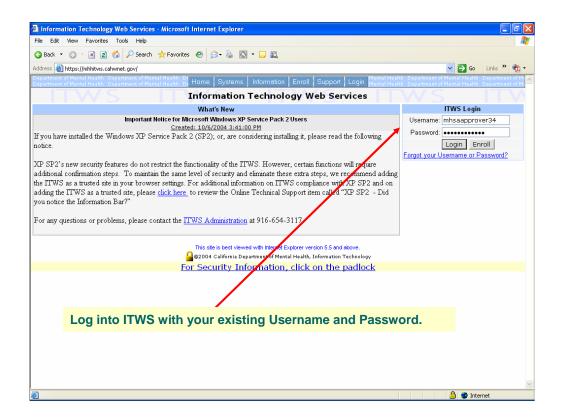**PLEASE REMEMBER TO FAX YOUR SIGNED ENROLLMENT REQUEST TO DMH ITWS.** Your enrollment will not be complete until DMH has received a signed copy of this request. You MUST indicate that you are an Approver Designee for your county. Otherwise, your Approver Designee status will not take effect.

ENROLLING AS AN APPROVER DESIGNEE: <u>NEW</u> ITWS USER

You will receive an email confirmation.

Enrolling as an
EXISTING ITWS User

Go to the ITWS website:
https://mhhitws.cahwnet.gov/

Log into ITWS with your existing Username and Password.

ENROLLING AS AN APPROVER DESIGNEE: <u>EXISTING</u> ITWS USER
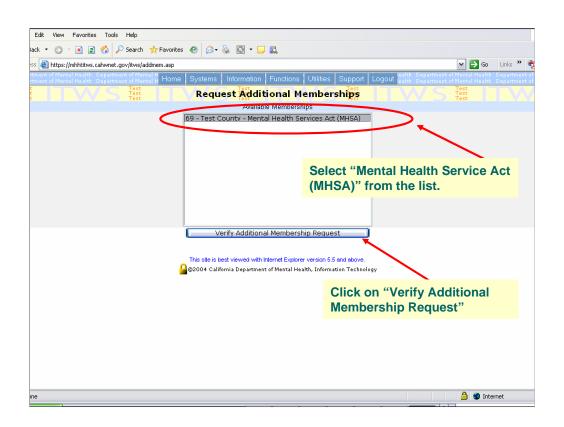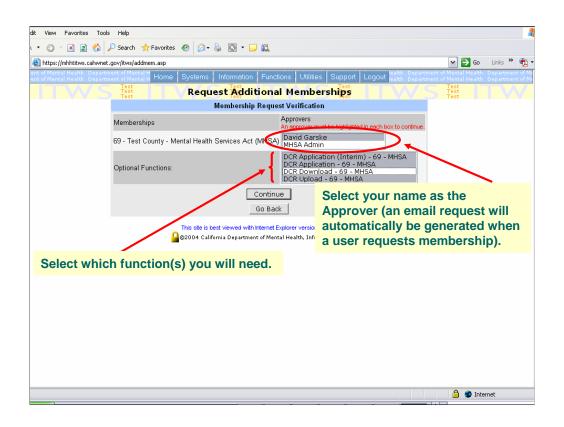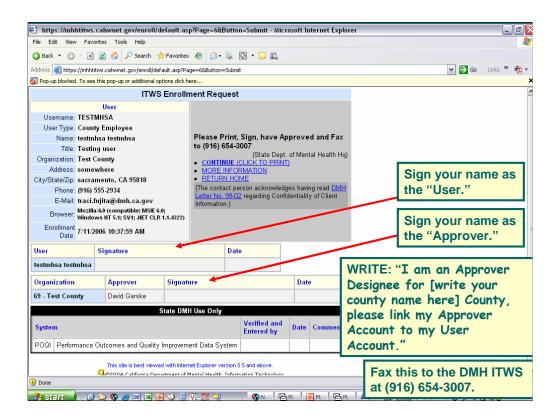
To access the ITWS, go to the ITWS website at https://mhhitws.cahwnet.gov/

Enter your username and password and click on Login.

Go to UTILITIES and select "Request Additional Membership"

Select which function(s) you will need.

Select your name as the Approver (an email request will automatically be generated when a user requests membership).

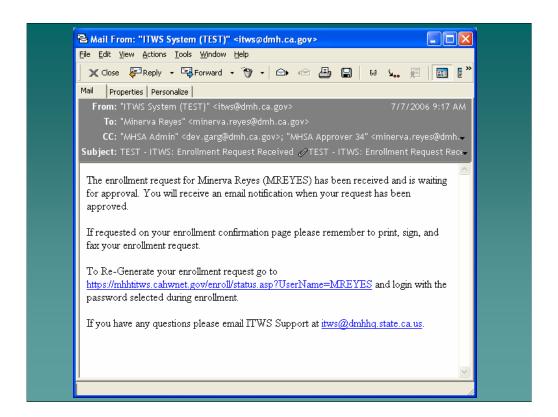## ENROLLING AS AN APPROVER DESIGNEE: NEW ITWS USER

Once you have submitted your enrollment request, you will see this enrollment request screen.

1. **PRINT this page.**
2. **SIGN and date the request next to your name as a USER.**
3. **SIGN and date the request next to your name as the APPROVER.**
4. **WRITE "I am an Approver Designee for [write your county name here] County, please link my Approver Account to my User Account." on the form.**
5. **FAX the form to the DMH ITWS at (916) 654-3007.**

PLEASE REMEMBER TO FAX YOUR SIGNED ENROLLMENT REQUEST TO DMH ITWS. Your enrollment will not be complete until DMH has received a signed copy of this request. You MUST indicate that you are an Approver Designee for your county. Otherwise, your Approver Designee status will not take effect.

ENROLLING AS AN APPROVER DESIGNEE: <u>EXISTING</u> ITWS USER

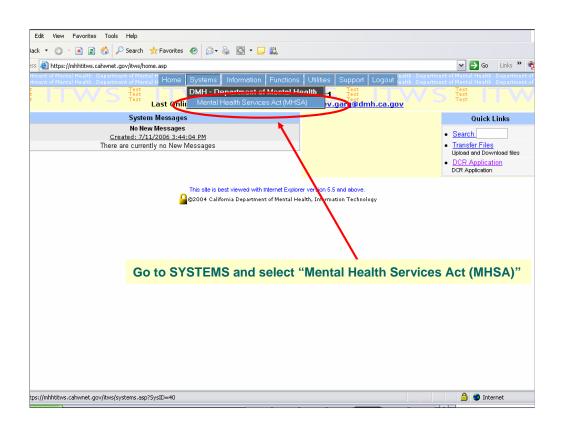You will receive an email confirmation.

RECAP of Steps #1 & #2

◆ Download and complete the DMH County Approver Certification form (MH3273).

◆ Once your county director has signed this form, fax it to DMH at (916) 654-3007.

◆ DMH will process this form and send you an email confirmation informing that you have been designated as an approver.

◆ After receiving this notification, configure access to the MHSA system for yourself either by enrolling as a new user or by expanding your existing membership.

◆ Once you have requested membership for yourself, print out and sign the ITWS Enrollment Request form and fax it to DMH at (916) 654-3007.

◆ DMH will link your approver account to your user account and notify you via email that you have been granted access to the MHSA System and may begin approving other users for your county.
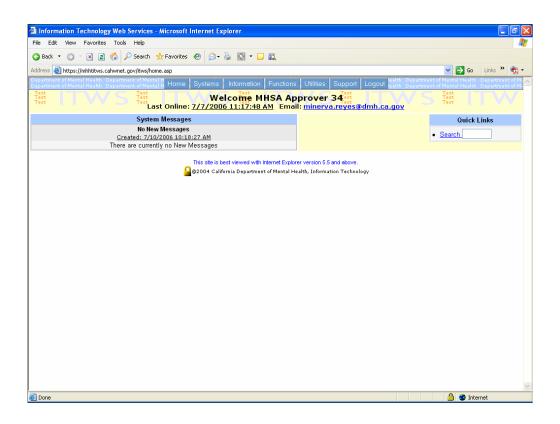
Navigating through the
MHSA Approver
Management Screens

Go to the ITWS website:
https://mhhitws.cahwnet.gov/

MHSA APPROVER Management Screens:

1. Go to the ITWS website at https://mhhitws.cahwnet.gov/
2. Login with your Username and Password

Go to SYSTEMS and select "Mental Health Services Act (MHSA)"

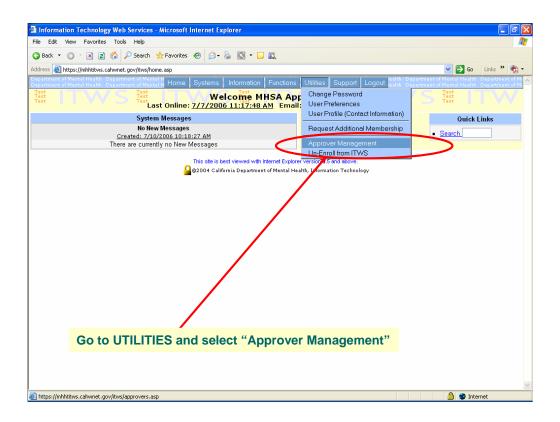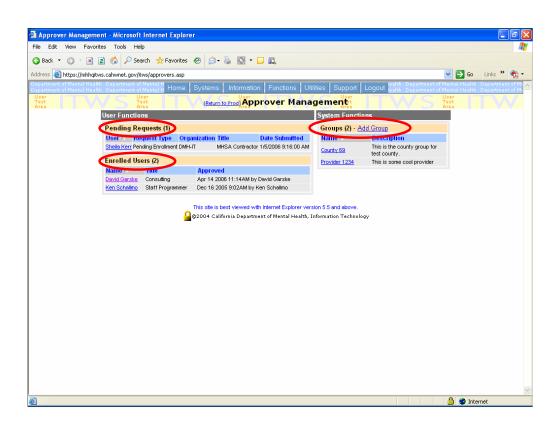**MHSA APPROVER Management Screens**

<u>Home Screen:</u>

You will be able to:

• View System Messages

• Access the DCR Application

• Upload/Download data and/or reports (for authorized users)

• Access the Approver Management screens

Go to UTILITIES and select "Approver Management"

MHSA APPROVER Management Screens:

Under the Utilities tab, select Approver Management.

MHSA APPROVER Management Screens

Approver Management MAIN PAGE:

This is your Approver Management main page. Here you will be able to:

•**View** pending requests, available groups, and enrolled users.

•**Approve** pending MHSA enrollment requests

•**Add** Groups (NOTE: You MUST add, at least, ONE group before approving any pending requests.)

>•To add a new group, click on the Add Group link in the upper right-hand side.

STEP # 3
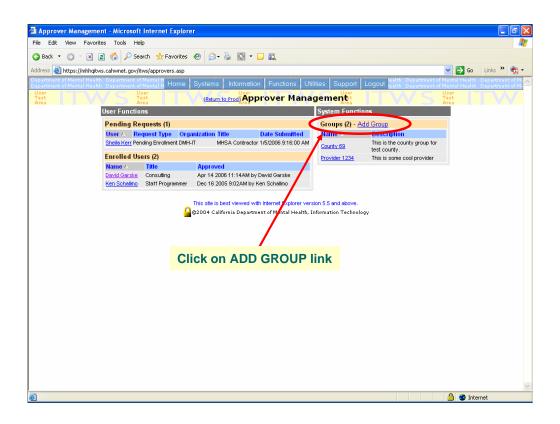
Creating a Master Group

Go to the ITWS website:

https://mhhitws.cahwnet.gov/
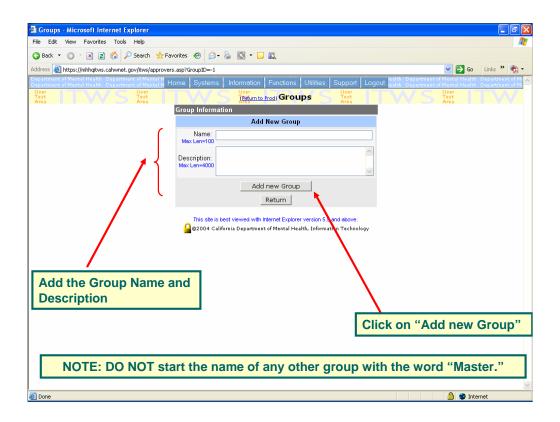
Master Group

◆ Each county is allowed ONE MASTER GROUP

◆ MASTER GROUP = access to ALL data

◆ Master group MUST be named according to the following format:

"Master [insert county name here] Group"

◆ Do NOT start the name of any OTHER group with the word "Master."

Creating a Master Group

On the Approver Management main page, click on Add Group

(NOTE: You MUST add, at least, ONE group before approving any pending requests.)

Add the Group Name and Description

Click on "Add new Group"

NOTE: DO NOT start the name of any other group with the word "Master."
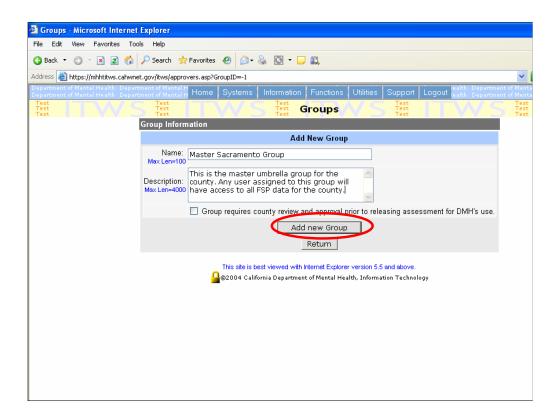
Creating a Master Group

ADDING GROUPS:
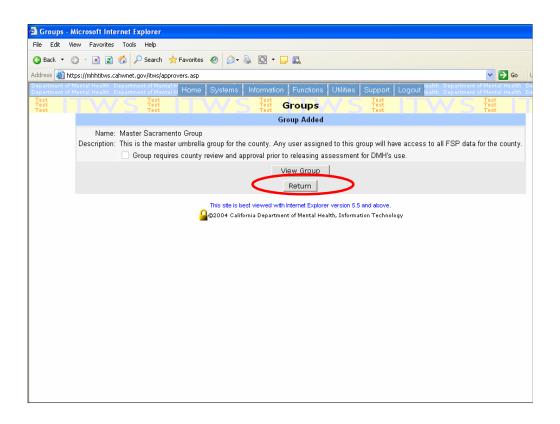
1.   Enter the name of the group: "Master [insert county name here] Group"

2.   Enter a short description of the group.

3. Click on "Add new Group."

NOTE: DO NOT start the name of any other group with the word "Master." Each county is only allowed ONE MASTER group.
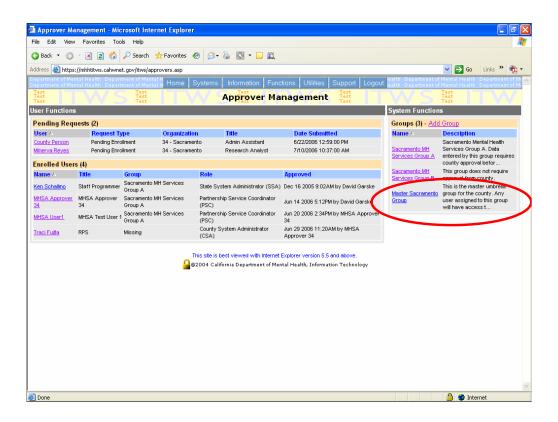
Creating a Master Group:

After entering a name and brief description of your group, click on the Add new Group button.

Adding a Master Group:

You will see confirmation that the group has been added. Click on Return to go back to the main page.

Adding a Master Group:

On the main page, you will now see your Master County Group under Groups.

STEP # 4

Enrolling Other County Users into the ITWS System

Go to the ITWS website:
https://mhhitws.cahwnet.gov/

Two ways to enroll into ITWS:

1. Enroll as a <u>NEW</u> user

2. Enroll as an <u>EXISTING</u> user

Enrolling as a user in ITWS:

Follow the steps outlined above
for NEW users
- OR –
Follow the steps outlined above
for EXISTING users

WHEN the USER reaches the last
step… **STOP**!

Enrolling as a user in ITWS:
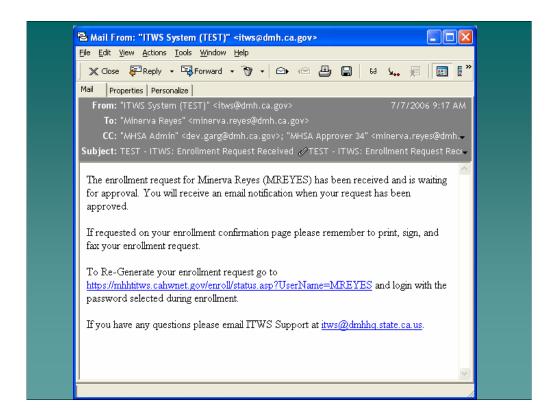
Follow the steps outlined above
for NEW users

- OR –

Follow the steps outlined above
for EXISTING users

WHEN the USER reaches the last step… **STOP**! No further action is required from the user. The approver designee completes the enrollment process by reviewing and approving the pending request.

The county user enrolling in the ITWS/MHSA System does NOT have to print/sign this form. Once the user hits the submit button, an email automatically gets sent to the user and approver designee(s) for the county.
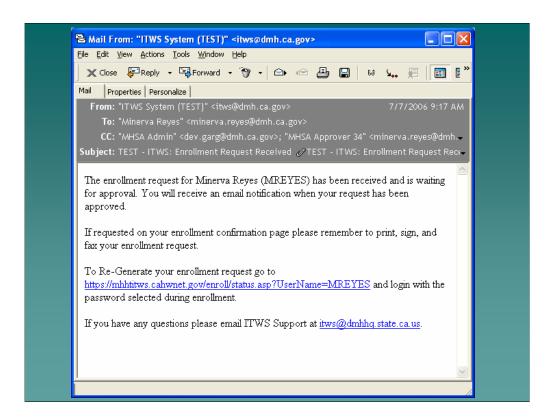
The new user will receive an email confirmation.

The Approver Designee(s) will also receive a copy of this email.

STEP # 5
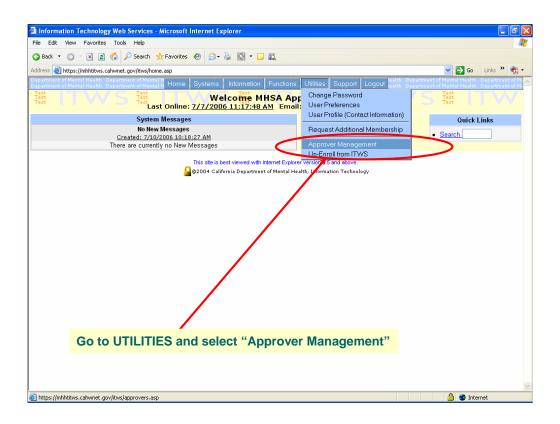
Approving Pending Requests for MHSA System Membership

Go to the ITWS website:
https://mhhitws.cahwnet.gov/

When there is a PENDING approval, ALL Approver Designees for the county will a 'carbon copy' of the email confirmation sent to the enrollee.
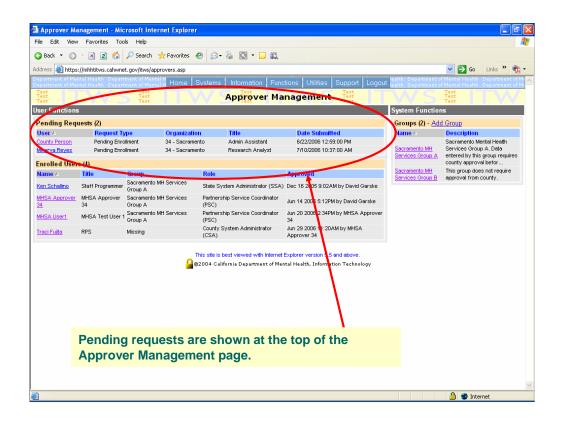
Once the Approver Designees receives the cc of this email, they must go log on to the ITWS and review the pending request.

Go to UTILITIES and select "Approver Management"

TO REVIEW PENDING REQUESTS:

Login to the ITWS, under Systems, select Mental Health Services Act.

Under the Utilities tab, select Approver Management.

Pending requests are shown at the top of the Approver Management page.
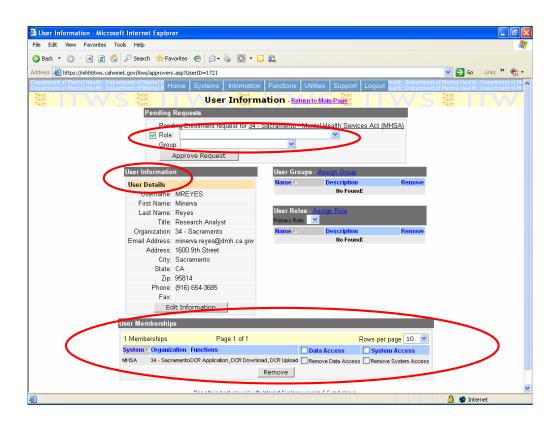
REVIEWING PENDING REQUESTS:
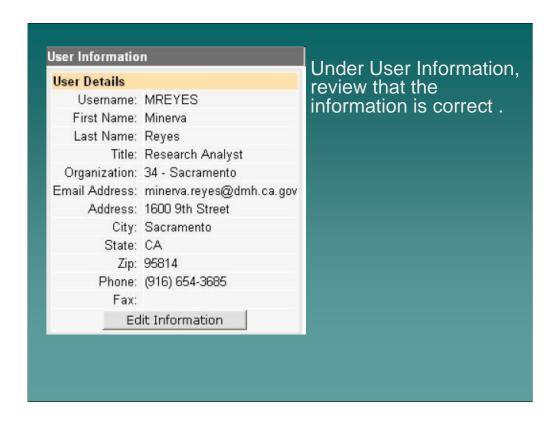
On your Approver Management main screen, you can see there are 2 pending requests.

To review the request, click on the users name.
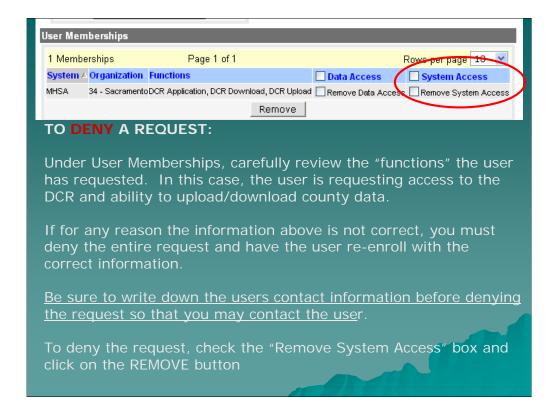
NOTE: You will see your own name here under pending requests. After setting up your master group, you must approve yourself.

REVIEWING PENDING REQUESTS:

- Pending Requests
- User Information
- User Memberships

User Information

User Details

Username:	MREYES
First Name:	Minerva
Last Name:	Reyes
Title:	Research Analyst
Organization:	34 - Sacramento
Email Address:	minerva.reyes@dmh.ca.gov
Address:	1600 9th Street
City:	Sacramento
State:	CA
Zip:	95814
Phone:	(916) 654-3685
Fax:	

Edit Information

Under User Information, review that the information is correct .

REVIEWING PENDING REQUESTS:

Under User Information, review that the information is correct.

User Memberships

1 Memberships		Page 1 of 1			Rows per page 10 ▾
System △	Organization	Functions	☐ Data Access		☐ System Access
MHSA	34 - Sacramento	DCR Application, DCR Download, DCR Upload	☐ Remove Data Access		☐ Remove System Access

Remove

TO DENY A REQUEST:

Under User Memberships, carefully review the "functions" the user has requested. In this case, the user is requesting access to the DCR and ability to upload/download county data.

If for any reason the information above is not correct, you must deny the entire request and have the user re-enroll with the correct information.

Be sure to write down the users contact information before denying the request so that you may contact the user.

To deny the request, check the "Remove System Access" box and click on the REMOVE button

Pending Requests

Pending Enrollment request for 34 - Sacramento - Mental Health Services Act (MHSA)

☑ Role:

Group:

Approve Request

TO APPROVE A REQUEST:

If all the information is correct, assign a group and then approve the request by clicking on the Approve Request button.

Once you approve the request, an email will be sent to the user stating that their request has been approved. The user can then login and access the system.

Do NOT assign ROLES at this time. This will be discussed in further detail when the enhanced DCR is made available.

All users must be assigned to a group in order to access the system.

Users can only belong to one group.

TO APPROVE A REQUEST:

If all the information is correct, assign a group and then approve the request by clicking on the Approve Request button.

Once you approve the request, an email will be sent to the user stating that their request has been approved. The user can then login and access the system.
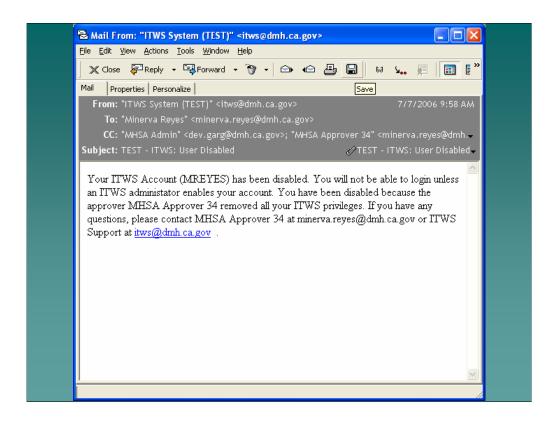
Do NOT assign ROLES at this time. This will be discussed in further detail when the enhanced DCR is made available.

All users must be assigned to a group in order to access the system.

Users can only belong to one group.

Once the Approved Designee approves the request for the MHSA System, the user will receive an email. At this point, they can now access the ITWS using their username and password.

Mail From: "ITWS System (TEST)" <itws@dmh.ca.gov>

From: "ITWS System (TEST)" <itws@dmh.ca.gov>   7/7/2006 9:58 AM
To: "Minerva Reyes" <minerva.reyes@dmh.ca.gov>
CC: "MHSA Admin" <dev.garg@dmh.ca.gov>; "MHSA Approver 34" <minerva.reyes@dmh.
Subject: TEST - ITWS: User Disabled   TEST - ITWS: User Disabled

Your ITWS Account (MREYES) has been disabled. You will not be able to login unless an ITWS administator enables your account. You have been disabled because the approver MHSA Approver 34 removed all your ITWS privileges. If you have any questions, please contact MHSA Approver 34 at minerva.reyes@dmh.ca.gov or ITWS Support at itws@dmh.ca.gov .

REVIEWING PENDING REQUESTS:

If you deny the request, the system will automatically send the above email to the user.

You must contact the user with the reasons why their account was not approved.

RECAP

Step #1:	Download and complete the DMH County Approver Certification form (MH3273).

Step #2:	Have your county director sign this form & fax it to DMH at (916) 654-3007.

Step #3:	After receiving confirmation from DMH that you have been set up as an Approver in the ITWS system, configure access to the MHSA Data System for yourself either by enrolling as a new user or by expanding your existing membership. (Note: Remember to print out and sign the ITWS Enrollment Request form and fax it to DMH at (916) 654-3007.) DMH staff will notify you via email that you have been granted access to the MHSA System.

Step #4:	Log into the ITWS MHSA Data System and set up a Master Group for your county.

Step #5:	Request your users to enroll into the ITWS to request access to the MHSA Data System.

Step #6:	Begin approving/denying users for the MHSA Data System.

DMH Performance Outcomes Contacts
POQI Support: POQI.Support@dmh.ca.gov

Candace Cross-Drew, Research Program Specialist
Phone: (916) 653-4582
Email: Candace.Cross-Drew@dmh.ca.gov

Traci Fujita, Research Program Specialist
Phone: (916) 653-3300
Email: Traci.Fujita@dmh.ca.gov

Brenda Golladay, Research Program Specialist
Phone: (916) 654-3291
Email: Brenda.Golladay@dmh.ca.gov

Marti Johnson, Research Program Specialist
Phone: (916) 654-3115
Email: Marti.Johnson@dmh.ca.gov

Alice Chen, Research Analyst
Phone: (916) 654-3560
Email: Alice.Chen@dmh.ca.gov

Minerva Reyes, Research Analyst
Phone: (916) 654-3685
Email: Minerva.Reyes@dmh.ca.gov

Christine Beck, Ph.D.

Acting Chief, Performance Outcomes and Quality Improvement
Phone: (916) 654-4612   Email: Christine.Beck@dmh.ca.gov

Stephanie Oprendek, Ph.D.

Acting Chief, Evaluation, Statistics and Support
Phone: (916) 653-3517   Email: Stephanie.Oprendek@dmh.ca.gov